



SuccessFactors
UNIVERSITY

Dashboards & Reports Training

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Before We Get Started

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- To minimize the web meeting dashboard

Click the arrow to minimize or maximize as necessary



- Remember to mute your lines when possible; if you do not have mute on your phone, click *6 on your phone, to un-mute, click #6
- Please do not put your phone on hold during the session
- Engage and ask questions as often as necessary

About the Session Today

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- You should have received a copy of the presentation, if you have not, please e-mail me at ldurnin@successfactors.com
- We hope to give you a solid introduction to Reporting
- You will not be an expert
- You can and should get more help after this session if you have questions:
 - If you are implementing, contact your Professional Services Consultant
 - If you are already implemented, contact your Customer Success Team

Agenda

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- Dashboards
- Filtering Your Information
- Analytics
- Detailed Document Search

Dashboards

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- Consolidation of chart-reports across a general topic
- Target Audience:
 - Executives
 - Managers with Direct Reports
 - HR Representatives
 - Administrators
 - Users with detailed reporting rights

Analytics

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- One-stop shop for all reports in the system
 - List Views
 - Spotlight Views
 - Spreadsheet Reports
 - Classic Reports
- Target Audience:
 - Different reports based on permissions
 - Those few people in an organization who need more detailed reporting information

Dashboards and List Views

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What are Dashboards?

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- Dashboards offer a one-page view of charts, graphs (which we call Portlets) that address specific questions about your organization
- Currently, there are 39 portlets addressing a range of topics
- All Dashboards can be found via the Dashboards tab

Pre-Defined Dashboards

- Three ready-to-use Dashboards

- Summary

- Gives a quick overview of information about process, performance and goals of your organization

- Performance

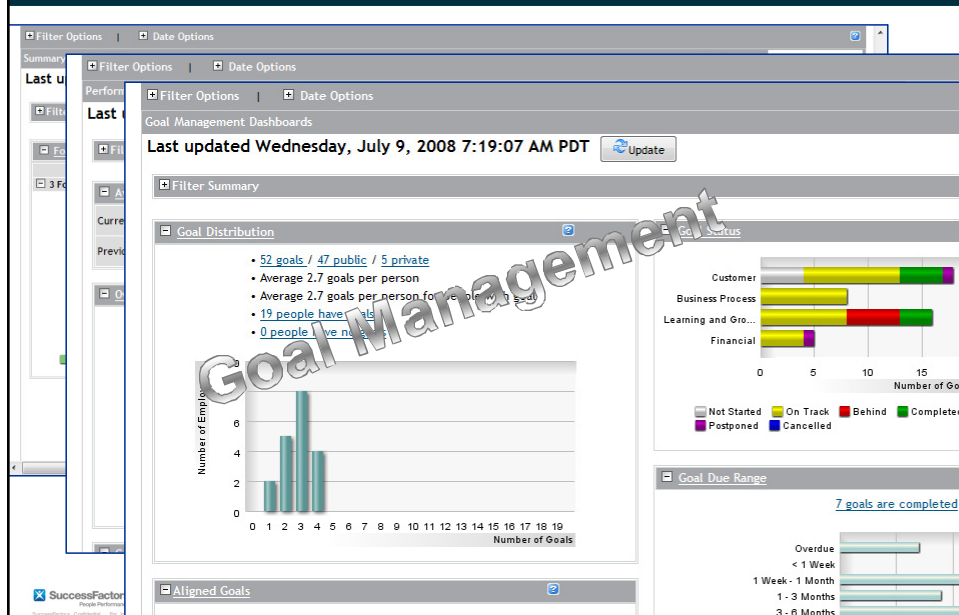
- Focuses on the performance and evaluation of your employees

- Goals Management

- Provides on the completion status, timeliness, and alignment of your corporate goals

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People Performance

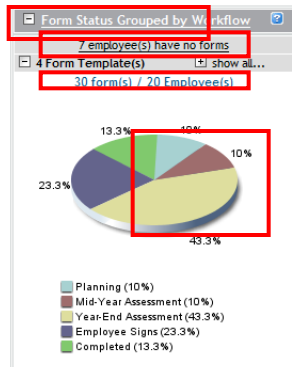
Summary, Performance, and Goal Dashboards



Portlet Detail Drill

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- Dashboards are comprised of individual portlets. Each portlet contains a chart, graph, or data about a specific topic. All portlets have the ability to drill into a List View to see the detailed information behind the chart.



- You can click on the **title bar** to get all of the data behind the chart
- Sometimes there are **links** available with specific data
- You can click a **section** of the chart, to get at the data behind that specific section

What are List Views?

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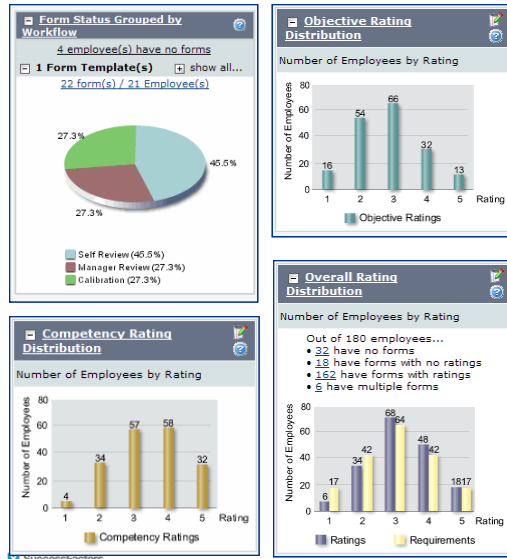
- List views are the detail behind the charts
- 4 Types: Form, Objective, Competency/Behavior, Employee
- Are in a table-format and accessible by:
 - Drilling on a chart in the dashboard;
 - Selecting a list view chart from the Reports Tab
- Include Configurable Display Options so you can choose what you see
- Can be saved for quick future access
- Can be exported to excel for further analysis

Items per page: 10 Showing 1-10 of 13 <<First <Prev 1 2 Next> >Last>

Employee Name	Form Title	Form Template	Current Step	Completion Status	Due Date	Past Due/Not
Dorris Douglass	Performance Review for Dorris Douglass	Performance Review	Year-End Assessment	In Progress	12/01/2008	Not Yet Due
Harry Wilson	Performance Plan for Harry Wilson	Performance Review	Year-End Assessment	In Progress	01/15/2008	Past Due
Harry Wilson	Performance Review for Harry Wilson	Performance Review	Year-End Assessment	In Progress	12/01/2008	Not Yet Due
Henry Fitch	Performance Plan for Henry Fitch	Performance Review	Year-End Assessment	In Progress	01/15/2008	Past Due
Jennifer Lo	Performance Plan for Jennifer Lo	Performance Review	Year-End Assessment	In Progress	01/15/2008	Past Due
Marcus Q. Hoff	Performance Review for Marcus Q. Hoff	Performance Review	Year-End Assessment	In Progress	11/30/2008	Not Yet Due

Form Status Portlets

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- Form status portlets display information about and from different form templates
- Monitor the progress of forms and get detail about forms at each stage
- See roll up views of ratings which are entered into forms
- Get an overview of how your team is being evaluated
- Get the detail behind all of these charts by drilling into the Form List View

Form List View

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- Gives managers and process owners detailed information about form ratings and status across the organization

Display Options

Columns

Filter Info:	Employee Info:	Form Info:	Form Status:	Performance:
<input type="checkbox"/> Division	<input checked="" type="checkbox"/> Employee Name	<input type="checkbox"/> Source	<input type="checkbox"/> Current Stage	<input type="checkbox"/> Rating (Unrounded)
<input type="checkbox"/> Department	<input type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Form Title	<input type="checkbox"/> Currently With (name)	<input type="checkbox"/> Rating (Rounded)
<input type="checkbox"/> Location	<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Form Template	<input checked="" type="checkbox"/> Current Step	<input type="checkbox"/> Normalized Rating (Unrounded)
	<input type="checkbox"/> Middle Name	<input type="checkbox"/> Document Id	<input type="checkbox"/> Step Type	<input type="checkbox"/> Normalized Rating (Rounded)
	<input type="checkbox"/> Job Title		<input type="checkbox"/> Manager Done (360)	<input type="checkbox"/> Potential Rating
	<input type="checkbox"/> Email		<input type="checkbox"/> Employee Done (360)	<input type="checkbox"/> Normalized Potential Rating
	<input type="checkbox"/> Manager		<input checked="" type="checkbox"/> Completion Status	<input type="checkbox"/> Goal Rating
	<input type="checkbox"/> HR Manager		<input checked="" type="checkbox"/> Due Date	<input type="checkbox"/> Normalized Goal Rating
	<input type="checkbox"/> Job Code		<input checked="" type="checkbox"/> Past Due/Not Yet Due	<input type="checkbox"/> Competency Rating
				<input type="checkbox"/> Normalized Competency Rating

Save Settings Export to Excel Schedule Export

Last updated Wednesday, July 9, 2008 7:22:18 AM PDT

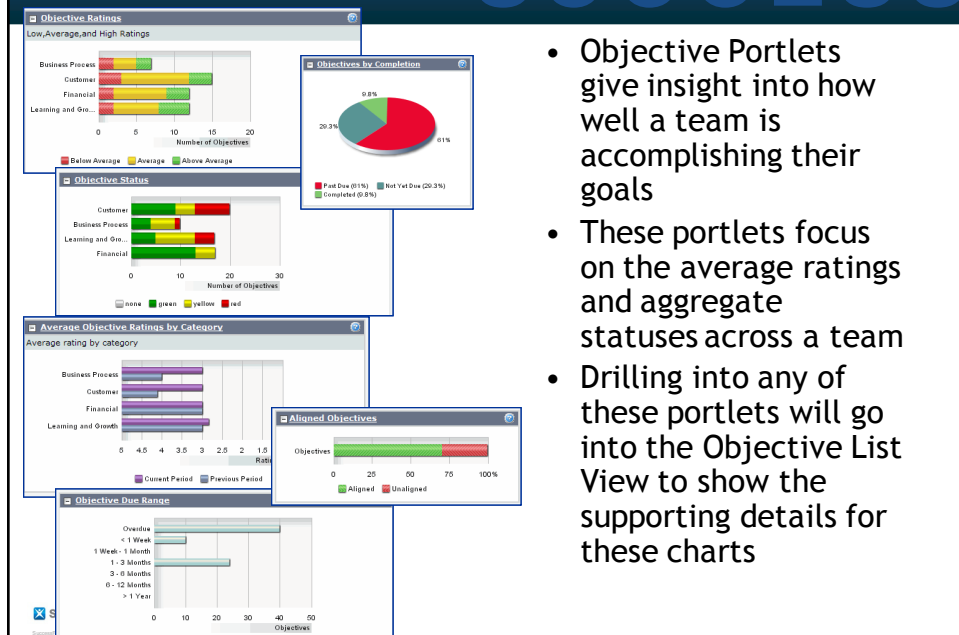
Filter Summary

Items per page: 10 Showing 1-10 of 13 <<First <Prev 1 2 Next> Last>>

Employee Name	Form Title	Form Template	Current Step	Completion Status	Due Date	Past Due/Not Yet Due
Dorris Douglass	Performance Review for Dorris Douglass	Performance Review	Year-End Assessment	In Progress	12/01/2008	Not Yet Due
Harry Wilson	Performance Plan for Harry Wilson	Performance Review	Year-End Assessment	In Progress	01/15/2008	Past Due
Harry Wilson	Performance Review for Harry Wilson	Performance Review	Year-End Assessment	In Progress	12/01/2008	Not Yet Due
Henry Fitch	Performance Plan for Henry Fitch	Performance Review	Year-End Assessment	In Progress	01/15/2008	Past Due

Objective Portlets

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- Objective Portlets give insight into how well a team is accomplishing their goals
- These portlets focus on the average ratings and aggregate statuses across a team
- Drilling into any of these portlets will go into the Objective List View to show the supporting details for these charts

Objective List View

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- Provides detailed insight into the organization's goals and can be sorted for example by:
 - Category
 - Percent complete
 - Goal Name
 - Status
 - Progress
 - Alignment
 - Start and Due Dates
 - Ratings

Display Options

Columns	Goal Info:	Goal Status:
<input checked="" type="checkbox"/> Goal Name	<input checked="" type="checkbox"/> Status	
<input checked="" type="checkbox"/> Category	<input checked="" type="checkbox"/> Start Date	
<input checked="" type="checkbox"/> Owner	<input checked="" type="checkbox"/> Due Date	
<input type="checkbox"/> Last Name	<input checked="" type="checkbox"/> % Complete	
<input type="checkbox"/> First Name	<input checked="" type="checkbox"/> Progress	
<input type="checkbox"/> Middle Name		
<input type="checkbox"/> Manager		
<input type="checkbox"/> HR Manager		
<input checked="" type="checkbox"/> Rating		
<input type="checkbox"/> Weight		
<input type="checkbox"/> Public/Private		
<input type="checkbox"/> Aligned/Unaligned		
<input type="checkbox"/> Last Modified Date		

Save Settings Export to Excel Schedule Export

Last updated Wednesday, July 9, 2008 7:23:52 AM PDT

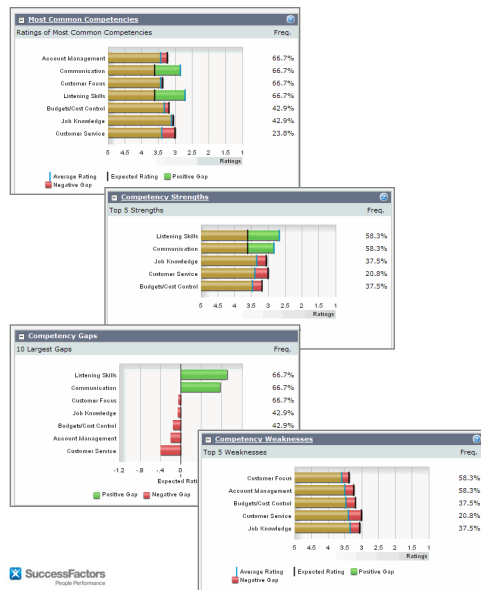
Filter Summary

Items per page: 10 Showing 1-10 of 72 | <<First <Prev 1 2 3 4 5 6 7 ... Next> Last>>|

Goal Name	Category	Owner
Achieve a 70% reduction in number of complaints from customers who were not satisfied with how long it took for them to receive assistance	Customer	John Gro

Competency Portlets

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- Competency related portlets give insight into how a team is performing
- These portlets focus on the average ratings across a team to reveal the strengths and weaknesses of an organization
- Drilling into any of these portlets will go into the Competency List View to show the supporting details for these charts

Competency/Behavior List View

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- Offers managers a detailed view into their team's performance on specific competencies or behaviors

Competency List

Filter Options | Date Options

Display Options

Columns

Competency Info: ☒ Competency Name ☒ Average Rating ☒ Frequency % ☒ Frequency # ☒ Average Weight ☒ Required Score ☒ Gap ☒ Category

Distribution Ratings: ☐ # 1s ☐ # 2s ☐ # 3s ☐ # 4s ☐ # 5s

Distribution %: ☐ % 1s ☐ % 2s ☐ % 3s ☐ % 4s ☐ % 5s

Save Settings | Export to Excel | Schedule Export

Last updated Wednesday, July 9, 2008 7:24:59 AM PDT

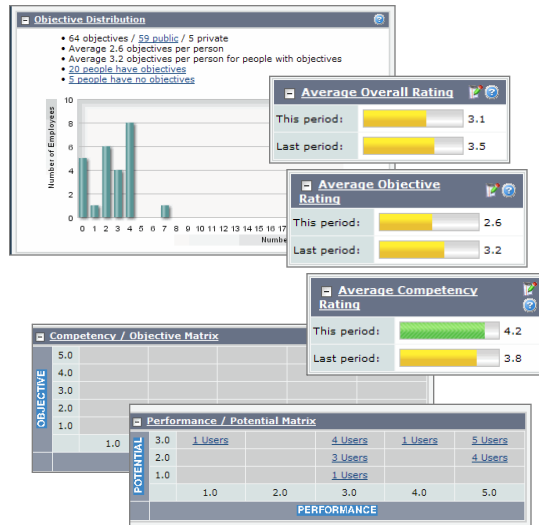
Filter Summary

Items per page: 10 | Showing 1-10 of 13 | <<First | Prev | 1 | 2 | Next> | Last>> |

Competency Name	Average Rating	Frequency %	Frequency #	Average Weight	Required Score	Gap	Category
Budgets/Cost Control	3	35%	7	15%	3.64	-0.64	My Category
Communication	3.18	80%	16	22%	3.23	-0.05	My Category
Customer Focus	3.2	80%	16	23%	2.96	0.24	Training
Customer Service	2.75	20%	4	20%	3.08	-0.33	My Category

Employee Portlets

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- Employee Portlets give roll-up information about how your team is performing on an individual and aggregate level
- Drilling into any of these portlets will go into the Employee List View to show details to support the data in these charts

Employee List View

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- Shows detailed information about each user, such as personal and job information, performance, and data from other system capabilities—compensation, succession and live profile

Display Options

Columns	Filter Info:	Personal Info:	Job Info:	Performance:	Diversity:	Compensation:
<input type="checkbox"/> Division	<input checked="" type="checkbox"/> Employee Name	<input type="checkbox"/> Job Code	<input checked="" type="checkbox"/> Overall Rating This Period (Rounded)	<input checked="" type="checkbox"/> Gender	<input type="checkbox"/> Level	
<input type="checkbox"/> Department	<input type="checkbox"/> Last Name	<input type="checkbox"/> Job Title	<input type="checkbox"/> Overall Rating This Period (Unrounded)	<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Pay Grade	
<input checked="" type="checkbox"/> Location	<input type="checkbox"/> First Name	<input type="checkbox"/> Manager	<input type="checkbox"/> Overall Rating Last Period	<input type="checkbox"/> Nationality	<input type="checkbox"/> Comp-ratio	
	<input type="checkbox"/> Middle Name	<input type="checkbox"/> HR Manager	<input type="checkbox"/> Potential Rating This Period	<input type="checkbox"/> Ethnicity	<input type="checkbox"/> Range Penetration	
	<input type="checkbox"/> Username	<input type="checkbox"/> # of Direct Reports	<input type="checkbox"/> Goal Rating This Period	<input checked="" type="checkbox"/> Minority	<input type="checkbox"/> Current Salary	
	<input type="checkbox"/> Employee Id	<input type="checkbox"/> Hire Date	<input type="checkbox"/> Competency Rating This Period	<input type="checkbox"/> Married	<input type="checkbox"/> Lump Sum	
	<input type="checkbox"/> Email	<input type="checkbox"/> Date of Position	<input type="checkbox"/> Goal Count		<input type="checkbox"/> Total Raise	
	<input type="checkbox"/> Business Phone	<input type="checkbox"/> New to Company	<input type="checkbox"/> Competency Count		<input type="checkbox"/> Final Salary	

Items per page: 10 Showing 1-10 of 27 | <<First <Prev 1 2 3 Next> Last>>|

Employee Name	Location	Job Title	Hire Date	Date of Position	New to Company	Overall Rating This Period (Rounded)	Gender	Minority
Barry Chen	Central	Sales Manager	04/03/1999		No	1	M	Yes
Cheryl Wang	Central	Account Manager	10/02/2001		No	3	F	Yes
Diana Stille	West	Sales Manager	07/15/2001		No		F	No
Dorris Douglass	Central	Sales Manager	07/30/2003		No	4	F	No
Eric Armstrong	East	SFU Trainer	02/25/2008		No		M	No
Harry Wilson	East	Account Manager	04/15/2002		No	2	M	No

Filtering Your Information

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Filter Options: Source and Date Ranges

- Available at the report/dashboard level and used to select a reporting role and/or narrow the number of results returned by the data outputs

The screenshot displays the 'Filter Options' and 'Date Options' tabs. The 'Filter Options' section includes a 'Show:' dropdown with 'Team View' selected, a 'Starting from:' dropdown with 'Myself' selected, and a 'Find User...' link. To the right, 'Showing these levels:' includes checkboxes for 'Direct Reports', '2 below', and '3 below'. Below this is a 'Process:' dropdown menu currently set to 'Performance Management' with an 'Edit Processes>>' link. The 'View:' section contains three columns of checkboxes: 'Divisions' (ACE Enterprises, ACE Healthcare, ACE Services, ACE Software, N/A), 'Departments' (ACE Enterprises, ACE Software, Client Service, Clinical, Community Relations, Engineering), and 'Locations' (ACE-BR-1, ACE-CHN-1, ACE-DEU-1, ACE-FR-1, ACE-JP-1, ACE-KOR-1, ACE-MEX-1). An 'Update' button is located below these columns. At the bottom, the 'Date Options' section shows 'Current Period:' with 'Start Date: 01/01/2008' and 'End Date: 12/31/2009', and 'Previous Period:' with 'Start Date: 06/30/2000' and 'End Date: 12/31/2007'. Another 'Update' button is at the bottom of this section.

Line of Sight

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- Dashboards, List Views and Spotlight Views utilize an advanced filtering model to allow you to see data based on user's role
 - Managers see everyone in their team, from their direct reports all the way down their management hierarchy.
 - HR Representatives will be able to view everyone within their specific client group or business unit
 - Matrix Management allows managers to see everyone they have Matrix reporting rights over
 - Specific additional access given to user by an Administrator
 - Detailed Reporting Rights are advanced settings to allow specific users to see across Divisions, Departments and Locations

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Filter Options: Line of Sight

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- Available at the report/dashboard level and used to select a reporting role and/or narrow the number of results returned by the data outputs

Filter Options | Date Options

Show: ☒ Team View Starting from: Myself Find User... Showing these levels: ☒ Direct Reports ☒ 2 below ☒ 3 below

☐ Matrix Reports

☐ Detailed Reporting Rights

Process: Performance Management Edit Processes>>

View:

Divisions	Departments	Locations
<input checked="" type="checkbox"/> ACE Enterprises	<input checked="" type="checkbox"/> ACE Enterprises	<input checked="" type="checkbox"/> ACE-BR-1
<input checked="" type="checkbox"/> ACE Healthcare	<input checked="" type="checkbox"/> ACE Software	<input checked="" type="checkbox"/> ACE-CHN-1
<input checked="" type="checkbox"/> ACE Services	<input checked="" type="checkbox"/> Client Service	<input checked="" type="checkbox"/> ACE-DEU-1
<input checked="" type="checkbox"/> ACE Software	<input checked="" type="checkbox"/> Clinical	<input checked="" type="checkbox"/> ACE-FR-1
<input checked="" type="checkbox"/> N/A	<input checked="" type="checkbox"/> Community Relations	<input checked="" type="checkbox"/> ACE-JP-1
	<input checked="" type="checkbox"/> Engineering	<input checked="" type="checkbox"/> ACE-KOR-1
		<input checked="" type="checkbox"/> ACE-MEX-1

Update

Current Period: Start Date: 01/01/2008 End Date: 12/31/2009

Previous Period: Start Date: 06/30/2000 End Date: 12/31/2007

Update

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Date Options

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- Used to specify which forms to include in the data for the report

The screenshot shows the 'Date Options' dialog box. The 'Show' section has 'Team View' selected. The 'Process' dropdown is set to 'Performance Management'. The 'Views' section has three columns: 'Divisions' (ACE Enterprises, ACE Healthcare, ACE Services, ACE Software, N/A), 'Departments' (ACE Enterprises, ACE Software, Client Service, Clinical, Community Relations, Engineering, Finance), and 'Locations' (ACE-BR-1, ACE-CHN-1, ACE-DEU-1, ACE-FR-1, ACE-JP-1, ACE-KOR-1, ACE-MEX-1). The 'Showing these levels' section has 'Direct Reports', '2 below', and '3 below' checked. The 'Current Period' date range is 01/01/2008 to 12/31/2009, and the 'Previous Period' date range is 06/30/2000 to 12/31/2007. Both date ranges are highlighted with red boxes.

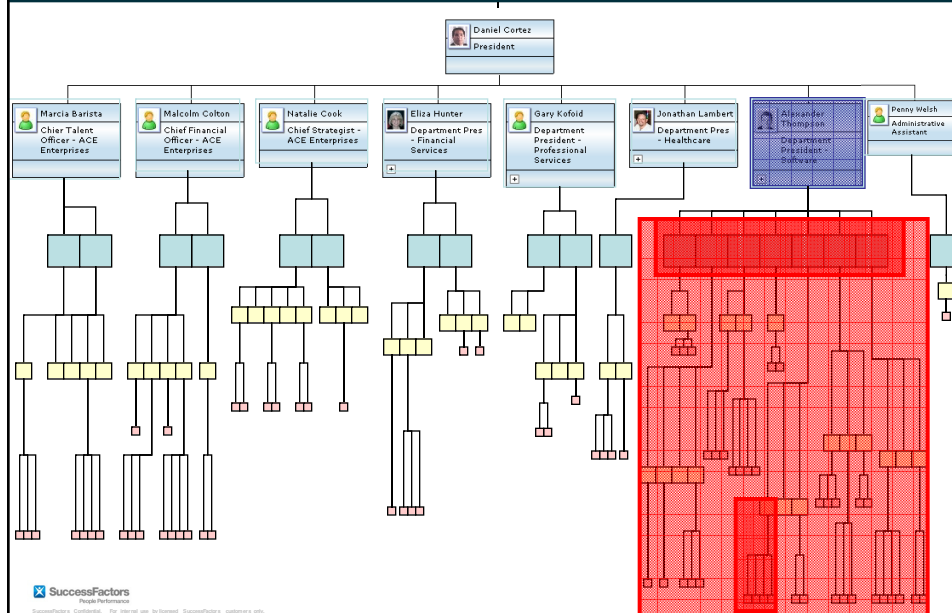
All Filter Options

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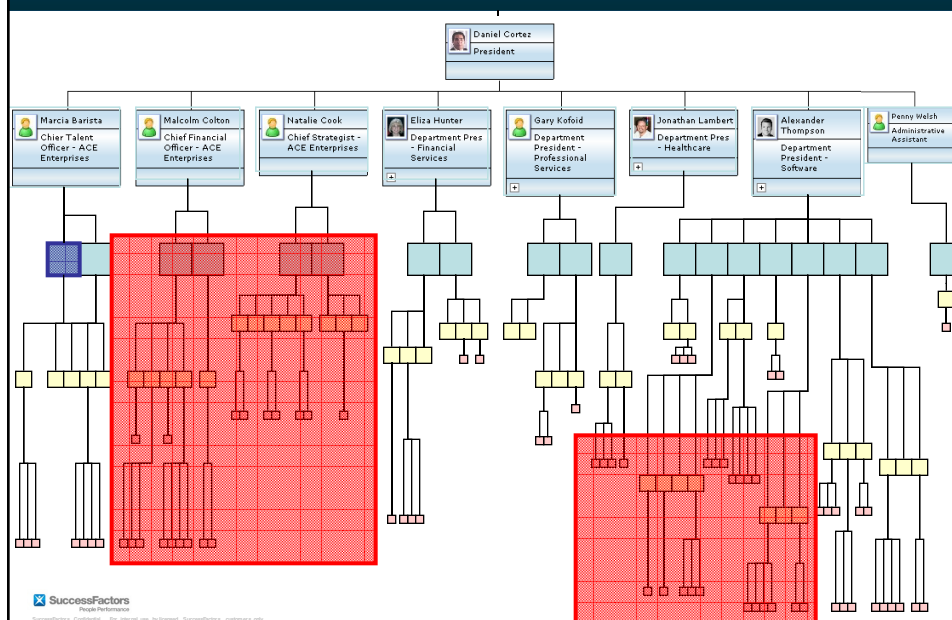
- Used at the report/dashboard level and can be combined to narrow and pin-point the specific data outputs

The screenshot shows the 'All Filter Options' dialog box. The 'Show' section has 'Team View' selected. The 'Process' dropdown is set to 'Performance Management Process'. The 'View' section has three columns: 'Divisions' (ACE Enterprises, ACE Financial Services, ACE Healthcare, ACE Professional Services, ACE Public Sector, ACE Services, ACE Software), 'Departments' (ACE Agency, ACE Department, ACE Financial Services, ACE Healthcare, ACE Professional Services, ACE Software, Clinical), and 'Locations' (ACE_C_HQ, ACE_F_HQ, ACE_H_HQ, Branch 54, Branch 55, Central, Clinic 1). The 'Showing these levels' section has 'Direct Reports', '2 below', and '3 below' checked. The 'Current Period' date range is 01/01/2006 to 12/31/2006, and the 'Previous Period' date range is 06/30/2000 to 12/31/2005. Both date ranges are highlighted with red boxes.

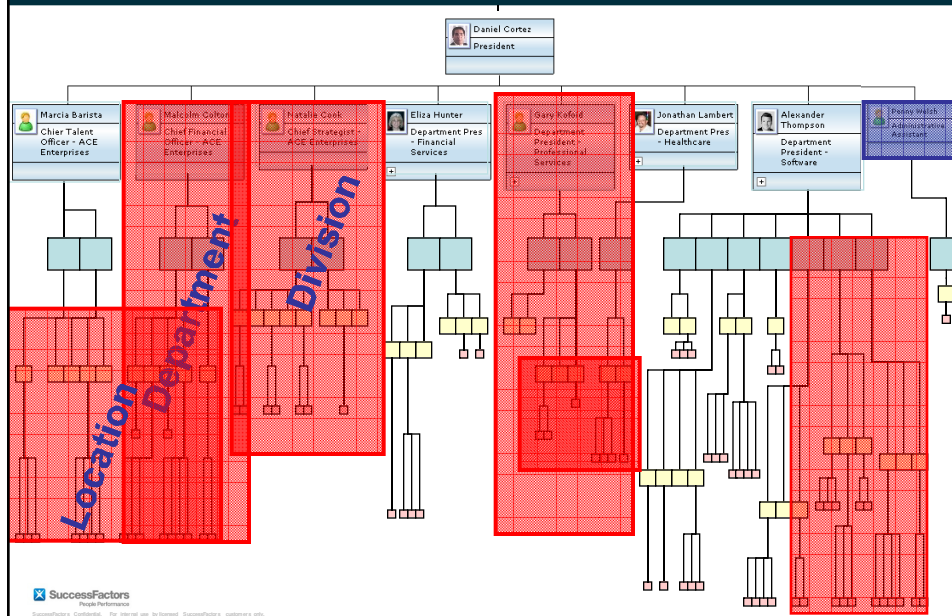
Example: Manager with a 164 member team



Example: HR Rep with 48 member client group

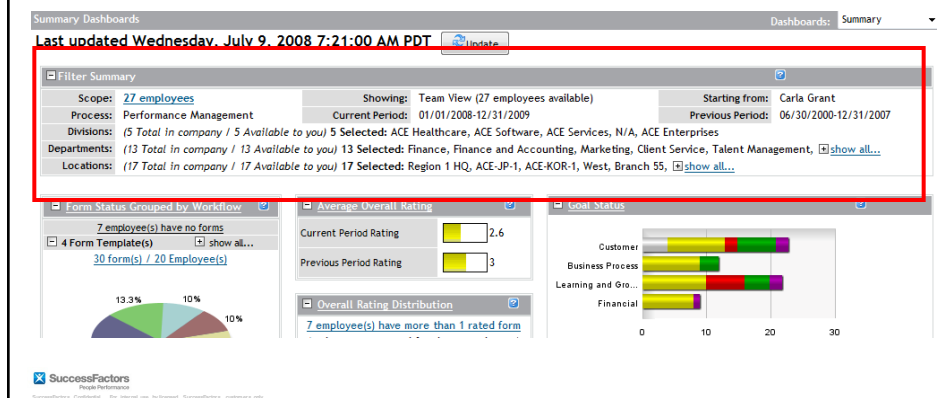


Example: Admin with Detailed Reporting Rights



Filter Summary

- Available on every Dashboard and List View as a quick way to identify exactly what data is being included on the report
- Separate function from the Filter and Date options to indicate exactly who and what is being captured in each report



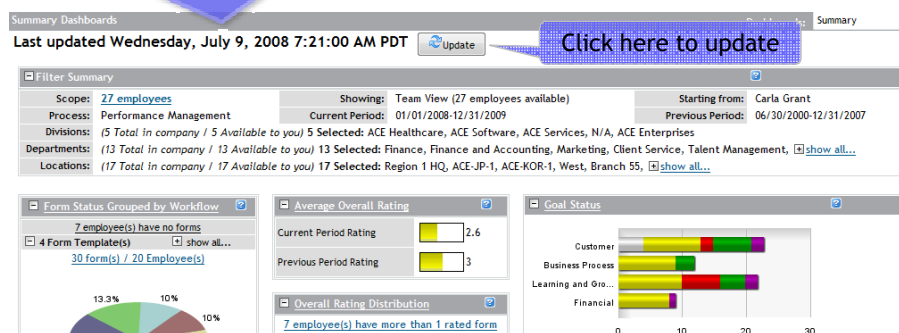
Important Information Regarding Dashboard Data

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On Demand Data Updates in Dashboards

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Date and Time of last update shown here



Analytics

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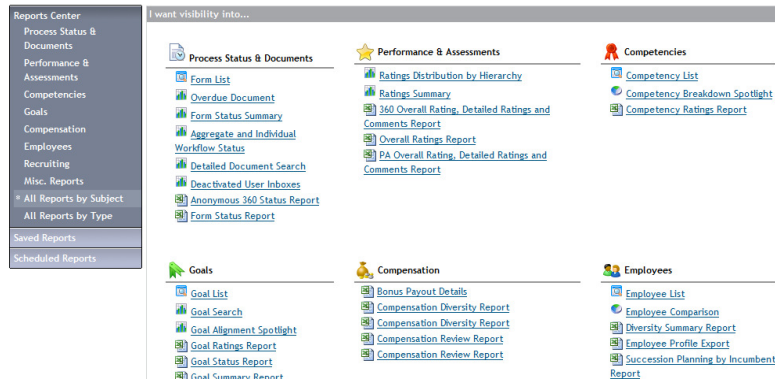
Analytics Tab

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- The Reports Center allows you to access all of the reports in a single place.
- We offer reports about all of the topics listed in several different formats: List Views, Spotlight Views, Spreadsheet Reports and Classic Reports.

Reports Center

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- The Reports center offers a variety of ways to display the reports in the system.
 - By category
 - By type
 - Or all reports by subject or type

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4 Types of Reports

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- List Views (real time reports)
 - Integrated with Dashboards



- Spotlight Views (real time reports)
 - At-a-glance graphical statistics about one very focused subject

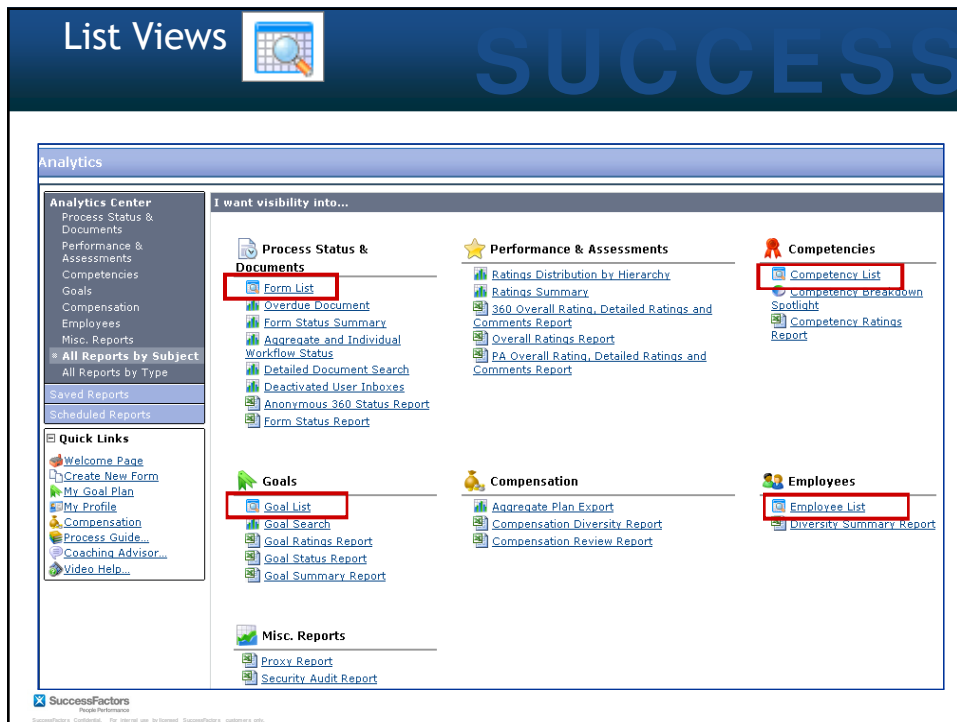


- Spreadsheet Reports (batched reports)
 - Excel Pivot Table workbooks



- Classic Reports (batched reports)
 - Original reporting in SuccessFactors which allows you to run ad hoc queries on a myriad of topics and extract the data into Excel

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List Views: Key Components

- List Views are reports in a standard table format to give you a detailed view into the numbers behind the dashboards for employees, forms, and performance factors
 - Four List Views Available: Form List, Objective List, Competency/Behavior List, and Employee List
 - Powerful Filter Options allow you to narrow your query to the people and/or forms that you want to see
 - Configurable Display Options allow you to set up and select additional data columns for the people/forms you are viewing in the List View
 - Save Report Settings so you can easily retrieve the filter and display options you had set in a prior session
 - Export to Excel allows you to do further analysis on the data provided

List Views: Export to Excel



- List View reports can be Exported to Excel easily simply by clicking Export to Excel button

Form List

Filter Options **Date Options**

Display Options

Columns

Filter Info: ☐ Division ☐ Department ☐ Location

Employee Info: ☒ Employee Name ☐ Email ☐ Manager ☐ Human Resource ☐ Job Code ☐ Title

Form Info: ☒ Form Title ☒ Form Template ☐ Document Id

Form Status: ☒ Current Stage ☐ Currently With (name) ☐ Current Step ☐ Step Type ☐ Manager Done (360) ☐ Employee Done (360) ☐ Completion Status ☐ Due Date ☐ Past Due/Not Yet Due

Performance: ☒ Rating (Unrounded) ☒ Rating (Rounded) ☒ Normalized Rating (Unrounded) ☒ Normalized Rating (Rounded) ☐ Objective Rating ☐ Normalized Objective Rating ☐ Competency Rating ☒ Normalized Competency Rating

Filter Summary

[Save Settings](#) [Export to Excel](#)

Items per page: 10 20 Showing 1-10 of 22 | << First < Prev 1 2 3 Next > Last >>

Employee Name	Form Title	Form Template	Current Stage	Completion Status	Rating (Unrounded)	Normalized Rating (Unrounded)	Normalized Rating (Rounded)	Objective Rating	Competency Rating	Normalized Competency Rating
Barry Chrost	Annual Review for Barry Chrost	Annual Review	Modify Stage	In Progress	5	5	5			
Chen Wang	Annual Review for Chen Wang	Annual Review	Modify Stage	In Progress	3	3	3			
Donna Cloudless	Annual Review for Donna Cloudless	Annual Review	Modify Stage	In Progress	3	3	3			
Henry Wilson	Annual Review for Henry Wilson	Annual Review	Modify Stage	In Progress	3	3	3			
Henry Fish	Annual Review for Henry Fish	Annual Review	Modify Stage	In Progress						
James Seed	Annual Review for James Seed	Annual Review	Modify Stage	In Progress	4	4	4			
John Groce	Annual Review for John Groce	Annual Review	Modify Stage	In Progress						
Judy H. Hoffman	Annual Review for Judy H. Hoffman	Annual Review	Modify Stage	In Progress	3	3	3			
Larry E. Hobbins	Annual Review for Larry E. Hobbins	Annual Review	Modify Stage	In Progress	1	1	1			

Spotlight Views



Reports

Reports Center

- Process Status & Documents
- Performance & Assessments
- Competencies
- Goals
- Compensation
- Employees
- Misc. Reports
- All Reports by Subject
- All Reports by Type
- Saved Reports
- Scheduled Reports

Quick Links

- Business & Development
- Goals
- Writing Assistant...
- Coaching Advisor...
- Video Help...
- Notes

I want visibility into...

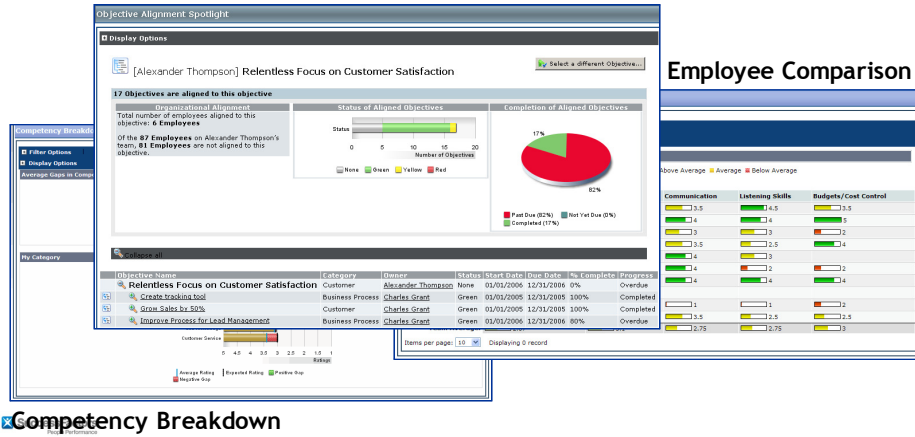
- Process Status & Documents**
 - Form List
 - Overdue Document
 - Form Status Summary
 - Detailed Document Search
 - Deactivated User Inboxes
 - Form Status Report
- Performance & Assessments**
 - Ratings Distribution by Hierarchy
 - Ratings Summary
 - 360 Overall Rating, Detailed Ratings and Comments Report
 - Overall Ratings Report
 - PA Overall Rating, Detailed Ratings and Comments Report
- Competencies**
 - Competency Breakdown Spotlight
 - Competency Ratings Report
- Goals**
 - Goal List
 - Goal Search
 - Goal Alignment Spotlight
 - Goal Ratings Report
 - Goal Status Report
 - Goal Summary Report
- Compensation**
 - Aggregate Plan Export
- Employees**
 - Employee List
 - Employee Comparison

Spotlight Views: 3 Reports Available

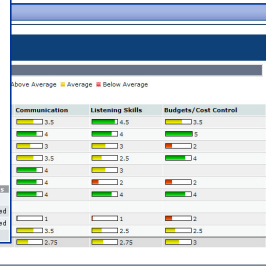


- All the information is presented on one page
- You can use these reports to quickly check up on a key process

Goal Alignment



Employee Comparison



Competency Breakdown

Spreadsheet Reports



Analytics

Analytics Center

Process Status & Documents

Performance & Assessments

Competencies

Goals

Compensation

Employees

Misc. Reports

Form List

Overdue Document

Form Status Summary

Aggregate and Individual Workflow Status

Detailed Document Search

Deactivated User Inboxes

Anonymous 360 Status Report

Form Status Report

Goal List

Goal Search

Goal Ratings Report

Goal Status Report

Goal Summary Report

Proxy Report

Security Audit Report

Aggregate Plan Export

Compensation Diversity Report

Compensation Review Report

Employee List

Diversity Summary Report

Competency List

Competency Breakdown Spotlight

Competency Ratings Report

Spreadsheet Report Example: Overall Ratings Report Menu

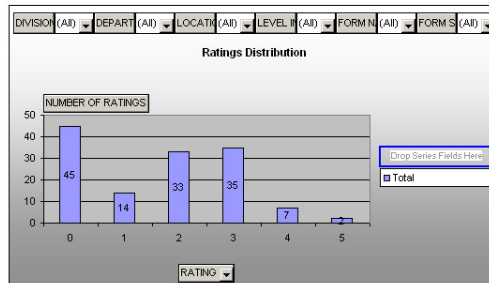


Workforce Performance Management - Overall Ratings Reports		
Report Generated: Thursday, September 29, 2005 6:46:34 PM PDT		
Report Descriptions		
Describes each report contained within this report workbook. Use the hyperlinks provided to quickly navigate to a specific report.		
Please note there may be a slight delay each time you open this report workbook as the data is refreshed in each report to enable filtering and drill down to details.		
Report Number	Report	Description
1	Overall Ratings Distribution	What is our overall ratings distribution and how closely does this match a bell curve distribution?
2	Division Average Ratings	How does each Division rank in overall rating ratings?
3	Division Ratings Distribution	What is the number and percentage of ratings submitted for each Division?
4	Department Average Ratings	How does each Department rank in overall rating ratings?
5	Department Ratings Distribution	What is the number and percentage of ratings submitted for each Department?
6	Location Average Ratings	How does each Location rank in overall rating ratings?
7	Location Ratings Distribution	What is the number and percentage of ratings submitted for each Location?
8	Manager's Team Average Ratings	How does each Manager's Team rank in overall rating ratings?
9	Manager's Team Ratings Distribution	What is the number and percentage of ratings submitted for each Manager's Team?
10	Form Average Ratings	What is the average rating for each Form relative to the minimum and maximum score?
	Overall Ratings Data	Displays the data used to create the above summary reports. Please do not delete this sheet.

Spreadsheet Report Example: Overall Ratings Report Actual Data



Workforce Performance Management - Overall Ratings Reports		
Report Generated: Thursday, September 29, 2005 6:46:34 PM PDT		
Overall Ratings Distribution		
Displays and charts the current distribution of ratings overall.		
Use the filters to change the report view. Double-click any numeric value to drill down to details.		
DIVISION (All)	DEPART (All)	LOCATI (All)
LEVEL IN ORG (All)	FORM N (All)	FORM S (All)
FORM NAME (All)		
FORM STATUS (All)		
RATING	NUMBER OF RATINGS	
0	45	
1	14	
2	33	
3	35	
4	7	
5	2	
Grand Total	136	



Classic Reports: Original Reporting



Analytics

Analytics Center
 Process Status & Documents
 Performance & Assessments
 Competencies
 Goals
 Compensation
 Employees
 Misc. Reports
All Reports by Subject
 All Reports by Type
 Saved Reports
 Scheduled Reports

Quick Links
 Welcome Page
 Create New Form
 My Goal Plan
 My Profile
 Compensation
 Process Guide
 Coaching Advisor
 Video Help

I want visibility into...

Process Status & Documents
 Form List
 Overdue Document
 Form Status Summary
 Aggregate and Individual Workflow Status
 Detailed Document Search
 Deactivated User Inboxes
 Anonymous 360 Status Report
 Form Status Report

Performance & Assessments
 Ratings Distribution by Hierarchy
 Ratings Summary
 360 Overall Rating, Detailed Ratings and Comments Report
 Overall Ratings Report
 PA Overall Rating, Detailed Ratings and Comments Report

Competencies
 Competency List
 Competency Breakdown Spotlight
 Competency Ratings Report

Goals
 Goal List
 Goal Search
 Goal Ratings Report
 Goal Status Report
 Goal Summary Report

Compensation
 Aggregate Plan Export
 Compensation Diversity Report
 Compensation Review Report

Employees
 Employee List
 Diversity Summary Report

Misc. Reports
 Proxy Report
 Security Audit Report

SuccessFactors
 People Performance

Batch Reports: Scheduled Reports (Classic and Spreadsheet)

Home My Goals My Forms **Reports** Directories Options My Profile Logout
 Dashboards Admin Tools
 Welcome, Carla Grant (cgrant)

Scheduled Reports

Reports Center
 Saved Reports
Scheduled Reports

Quick Links
 Welcome Page
 Create New Form
 Create New Note
 Compensation
 Coaching Advisor
 Succession
 Recruiting
 Talent Search
 Video Help
 Interview Reference

Scheduled Reports
 Use this page to download and manage scheduled reports. To download a completed report, click the name of the completed report and start, and remove failed or obsolete reports. The system automatically removes out of date reports periodically.

Report Name	Download	Download	Status
360 Overall Rating Detailed Ratings and Comments Report_2007-11-29_01-22-33	zipped	file(s)	Completed Thursday, Nov 29, 2007 1:22:33 PM

Remove Refresh

SuccessFactors
 People Performance

Archive & Print

SUCCESS

SuccessFactors

Home My Goals My Forms Reports Dashboards Admin Tools

Welcome, Carla Grant (cgrant)

Archive & Print

Use this page to create, download and manage archiving requests. To create a new archive, click on "Create New." To download a completed archive, click the name of the completed archive and save it to your local system. The system automatically removes completed archives after 7 days.

Create New Refresh

Please create a new archive by clicking "Create New" button.

Archive & Print

Use this page to create, download and manage archiving requests. To create a new archive, click on "Create New." To download a completed archive, click the name of the completed archive and save it to your local system. The system automatically removes completed archives after 7 days.

Create New Refresh

Please create a new archive by clicking "Create New" button.

- Document Archive
- Live Profile Archive
- Employee Scorecard Archive

SuccessFactors

Detailed Document Search Classic Report Example

SUCCESS

Reporting Tab ⇒ Reporting Category/Type ⇒ Detailed Document Search Link

Detailed Document Search

Detailed Document Search

Depending on the breadth of your query, the report may take several minutes to appear below. For document contents export process, it could take The maximum number of documents in one report process is 999.

Employee Document Folder Search:

'Employee Document Folder Search' is used to view the contents of a specific user's Inbox, En Route folder, or Completed folder.

Inbox for Employee Username: Find User...

Detailed Search:

'Detailed Search' is used to find documents based on one or more of the criteria below.

<input checked="" type="checkbox"/> Department:	<input checked="" type="checkbox"/> Division:	<input checked="" type="checkbox"/> Location:
<input checked="" type="checkbox"/> ACE Enterprises <input checked="" type="checkbox"/> ACE Software <input checked="" type="checkbox"/> Client Service <input checked="" type="checkbox"/> Clinical <input checked="" type="checkbox"/> Community Relations <input checked="" type="checkbox"/> Engineering <input checked="" type="checkbox"/> Finance	<input checked="" type="checkbox"/> ACE Enterprises <input checked="" type="checkbox"/> ACE Healthcare <input checked="" type="checkbox"/> ACE Services <input checked="" type="checkbox"/> ACE S <input checked="" type="checkbox"/> N/A	<input checked="" type="checkbox"/> ACE-BR-1 <input checked="" type="checkbox"/> ACE-CHN-1 <input checked="" type="checkbox"/> ACE-DEU-1

Search specific user's Inbox, En Route folder or Completed Folder.

Most powerful reporting feature. Returns empty reports if unchecked.

Active Document Subjects Only: ☒

Originator Username: Find User...

Subject Username: Find User...

Subject Employee Id:

Subject Job Code:

SuccessFactors
People Performance

Detailed Document Search

Active Document Subjects Only: ☒

Originator Username: Find User...

Subject Username: Find User...

Subject Employee Id:

Subject Job Code:

Hire Date: From/On(MM/DD/YYYY): to(MM/DD/YYYY):

Document Name: ☒ All ☐ Other

- 2007 Compensation Plan
- 2008 Annual Review
- 2008 Compensation Plan
- 2009 Annual Performance Review
- 360 Degree / Multi-Rater Review

Status: All(Except Draft and Deleted)

Document Ended: From/On(MM/DD/YYYY): to(MM/DD/YYYY):

Date Completed: ☒ None

☐ Today

☐ From/On(MM/DD/YYYY): to(MM/DD/YYYY):

(When Date Completed is selected, results contain only completed documents if any.)

Last Modified: ☒ None

☐ Today

☐ From/On(MM/DD/YYYY):

Last Routed: ☒ None

☐ Today

☐ From/On(MM/DD/YYYY):

Select .v4e format if exporting userids with leading zeroes if Excel requested, report will be created as .v4e format if > 500 documents.

Export File Format: SuccessFactors' v4e

Open Export Options >>

Generate Report Export Report Export Doc Contents(Compact) Export Doc Contents Export Doc Goals Export Search Criteria

Cancel

Detailed Document Search: Export Options

☐ Export reports in the expanded format. Applicable to Export Doc Content(Compact) only.
☐ Export reports in the non-expanded format. Applicable to Export Doc Content(Compact) only.
☐ Export reports in the summary format. Applicable to Export Report only.
☐ Export document goals. Applicable to Export Doc Goals only.

Add custom export configuration to my list for future reuse with the name: ☐ Shared

Document Fields: ☐ Select All

☐ Form Type ☐ Form Template Id ☒ Form Template Name ☒ Title
☒ Review Start ☒ Review End ☐ Due On ☐ Created On
☐ Goal/Competency Overall Rating ☐ Goal/Competency Overall Rating Desc ☐ Goal/Competency Calculated Rating

Employee Fields: ☐ Select All

☐ Employee Full Name With Username ☒ Employee Username
☒ Department ☒ Job Code
☐ Employee Misc Info Fields: ☐ Sensitive Data 1 ☐ Customizable Field 3 ☐ Customizable Field 4
☐ Customizable Field 8 ☐ Customizable Field 9 ☐ Customizable Field 10 ☐ Customizable Field 11

Manager Info Fields: ☐ Select All

☐ Manager Full Name With Username ☒ Manager Full Name ☒ Manager Id ☒ Manager Username
☐ Matrix Manager Info Fields: ☐ Select All
☐ Matrix Manager Full Name With Username ☐ Matrix Manager Full Name ☐ Matrix Manager Id ☐ Matrix Manager Username

360 Participant Info Fields: ☐ Select All

☐ Participant Full Name With Username ☐ Participant Full Name ☐ Participant Id ☐ Participant Username
☐ Competency ☐ Behavior ☒ Goal ☒ Successor
☒ PF Type ☐ PF Index ☐ Rater Category
☒ Grouping

Goal Info Fields: ☐ Select All

☐ Goal ☐ Successor

Save checkboxes selected when testing and for future use.

Miscellaneous information fields are customizable. Please contact your PS Consultant or Customer Success Advocate.

Owner = who the form is currently with

Current Step = where is the form at in the route map

Detailed Document Search: Performance Factors

Document Content Fields: ☐ Select All

☒ Competency ☐ Behavior ☒ Goal ☒ Successor ☒ Custom Field(s)
☒ PF Id ☒ PF Type ☒ PF Name ☒ PF Desc ☒ Rating
☒ Grouping ☒ Rater Category ☒ Manager Rating ☒ Direct Report Rating ☒ Manager Comment

Goal Info Fields: ☐ Select All

PF = Performance factor

Generically refers to whatever document element (s) you are trying to report on, e.g. goals, competencies, behaviors, custom fields, section and comments, overall form rating, etc.

PF Id = The unique key that identifies the custom field

PF Type = Custom

PF Name = The label visible to user

PF Desc = The content entered on the form

Microsoft Excel - DocDetails20030904_731.v4e

Completed On	PF Type	PF Id	PF Name	PF Desc
1	Overall Rating			
2	Section and Comment(s)	10	Overall Performance Summary and Additional Comments	
3	Section and Comment(s)	7	Evaluation of Performance Drivers	
4	Competency	52	Functional Expertise	 Demonstrates a commitment to meeting/exc
5	Competency	53	Business Acumen	 Develops, implements and monitors poli
6	Competency	58	Communication	 Communicates information effectively t
7	Competency	55	Organizational Culture and Values	 Conducts positive negotiations, handles cont
8	Competency	56	Leadership	 Creates and communicates a long-term visio
9	Competency	57	Results Orientation	 Effectively organizes work and achieves qual
10	Section and Comment(s)	6	Individual Performance Goals	
11	Goal	74	Another New Goal	New goal for who?
12	Section and Comment(s)	3	Corporate Goals -- Enterprise	

Two New Checkboxes: Parent Id and Parent Name

- Find out what section objectives or competencies belong to
- Find out what competency behaviors roll up to (rate by behaviors)

PF Type identified as...	Parent Id/Name reflects....
Competency	Section Id/Name
Behavior	Competency Id/Name
Goal	Section Id/Name
Successor	Section Id/Name
Custom Field(s)	Section Id/Name

Check the performance factor you want to report on ...

Document Content Fields: ☐ Select All

<input checked="" type="checkbox"/> Competency	<input type="checkbox"/> Behavior	<input checked="" type="checkbox"/> Goal	<input checked="" type="checkbox"/> Successor	<input checked="" type="checkbox"/> Custom Field(s)
<input checked="" type="checkbox"/> PF Id	<input checked="" type="checkbox"/> PF Type	<input checked="" type="checkbox"/> PF Name	<input checked="" type="checkbox"/> PF Desc	<input checked="" type="checkbox"/> Rating
<input checked="" type="checkbox"/> Grouping	<input checked="" type="checkbox"/> Rater Category	<input checked="" type="checkbox"/> Manager Rating	<input checked="" type="checkbox"/> Employee Rating	<input checked="" type="checkbox"/> Manager Comment
		<input type="checkbox"/> Section and Comment(s)	<input type="checkbox"/> Custom Fields/Other Comments/Ratings	
		<input checked="" type="checkbox"/> Parent Id	<input checked="" type="checkbox"/> Parent Name	

... check PF Id, PF Type, PF Name, PF Desc

... and also check the box for Parent Id and Parent Name

SuccessFactors
People Performance

Detailed Document Search
Exporting Data and Reporting Options

SUCCESS

Detailed Doc Search Page ⇒ Generate Report

- Displays results on screen
- Columns are predefined by the application
- Sorted by Title then Document ID

TIP: Use this report to access former employee's documents.

1. Uncheck Active Document Subjects Only.
2. Select Document Name.
3. Enter date parameters.
4. Click Generate Report.
5. Click on form title to open up form.
6. Print or save to desktop.

The screenshot shows the 'Detailed Doc Search Page' with various filters on the left and a table of results on the right. The filters include 'Active Document Subjects Only', 'Originator Username', 'Subject Username', 'Subject Job Code', 'How Dates', 'Document Names', 'Status', 'Date Completed', 'Last Modified', 'Last Routed', and 'Export File Format'. The 'Generate Report' button is highlighted with a red box. The table of results has columns for Title, Originator Full Name, Direct Report Full Name, Department, Division, and Location. The first row shows 'Leadership Performance Process Form TEST (Ely, Ely)' with originator 'admin (System Administrator)' and direct report 'Ely (Ely, Ely)'. The 'Generate Report' button is also highlighted with a red box.

Detailed Document Search Page ⇒ Export Options

⇒ Export Report

- Use to export high level document information to a file
- Can only include checkboxes in “Document Fields” (1st set), “Employee Fields” (2nd set) and “Misc Info Fields” (7th/last set)

The screenshot shows the 'Detailed Document Search Page' with various export options. The 'Export Report' button is highlighted with a red box. The options are grouped into several sections: 'Document Fields', 'Direct Report Fields', 'Direct Report Misc Info Fields', 'Manager Info Fields', 'Document Content Fields', 'Goal Info Fields', and 'Misc Info Fields'. Each section contains a list of checkboxes for selecting specific fields to export. The 'Generate Report' button is also highlighted with a red box.

Sample View: Export Report

- File will contain one row per document

1	Title	Employee User Id	Employee Username	Employee First Name	Employee Last Name	Employee Full Name	Department	Division
2	Management Performance	iiii	iiii	Ian	Iverson	Ian Iverson	TestD	Test
3	Management Performance	ssss	ssss	Steve	Simmons	Steve Simmons	TestD	Test
4	Management Performance	tttt	tttt	Tina	Thomas	Tina Thomas	TestD	Test
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

Detailed Doc Search Page ⇒ Export Options ⇒ Export Doc Contents

- Effective when used to export a limited amount of data
 - Example: Export data like **Export Report** + manager/job code/hire date
 - Example: Export custom fields into columns (instead of as separate rows)

Document Fields: ☐ Select All

☒ Form Template Name ☒ Document Id ☒ Content Id ☒ Status ☐ Overall Rating ☐ Rating Desc ☐ Calculated Overall Rating ☒ Scale

☒ Review Start ☒ Review End ☐ Due On ☐ Created On ☐ Last Modified On ☐ Last Routed On ☒ Completed On

Employee Fields: ☐ Select All

☐ Employee Full Name With Username ☒ Employee Full Name ☒ Employee User Id ☒ Employee Username ☒ Employee First Name ☒ Employee Last Name ☒ Department ☒ Division

Employee Misc Info Fields: ☐ Select All

☒ Job Code ☐ Hire Date ☒ Customizable Field 1 ☒ Customizable Field 2 ☒ Customizable Field 3 ☒ Project ID ☒ Customizable Field 5 ☒ Customizable Field 8 ☒ Customizable Field 9 ☒ Customizable Field 10 ☒ Customizable Field 11 ☒ Customizable Field 12 ☒ Customizable Field 13 ☒ Customizable Field 14 ☒ Customizable Field 15

Manager Info Fields: ☐ Select All

☐ Manager Full Name With Username ☒ Manager Full Name ☒ Manager Id ☒ Manager Username ☒ Manager First Name ☒ Manager Last Name

Document Content Fields: ☐ Select All

☒ Competency ☐ Behavior ☒ Goal ☒ Successor ☐ Custom Field(s) ☐ Comment(s) ☐ Section Name ☒ Section and

☒ PF Id ☒ PF Type ☒ PF Name ☒ PF Desc ☒ Rating ☐ Rating Desc ☒ Weight ☐ Parent Id

☒ Grouping ☒ Rater Category ☒ Manager Rating ☒ Employee Rating ☒ Manager Comment ☒ Employee Comment

Goal Info Fields: ☐ Select All

☒ Goal Metric ☒ Goal Target ☒ Goal Task ☒ Goal Id ☐ Goal Status ☐ % Completed/Actual

☐ Type ☒ Name ☒ Start ☒ Due ☒ Target

Misc Info Fields: ☐ Select All

☒ Owner Full Name With Username ☐ Owner Full Name ☐ Owner Id ☐ Owner Username ☐ Owner First Name ☐ Owner Last Name

☐ Originator Full Name With Username ☐ Originator Full Name ☐ Originator Id ☐ Originator Username ☐ Originator First Name ☐ Originator Last Name

☐ Current Step Number ☐ Current Step Name ☐ Total Routing Steps

☐ Include In Progress 360s in Document Content Export

Generate Report Export Report **Export Doc Contents(Compact)** **Export Doc Contents** Export Doc Goals Export Search Criteria Cancel

Sample View: Doc Contents Report (Long Format)

- File will contain one row per document

A	B	C	D	E	F	G	H
1	Document	Content Id	Status	Title	Owner Full Name With Username	Employee User Id	Employee Name
2	170	437	Modify Stage	Management Performance Review (Ian Iverson)	David Drew (dddd)	iiii	Ian
3	171	441	Modify Stage	Management Performance Review (Steve Simmons)	Ian Iverson (iii)	ssss	Steve
4	172	466	Completed	Management Performance Review (Tina Thomas)	Completed	tttt	Tina

AM	AN	AO	AP	AQ	AR
1	Completed	Document Details	Competency Name	Functional Expertise	Competency Desc
2		Evaluation of Performance Drivers	Competency Name	Functional Expertise	Competency Desc
3		Evaluation of Performance Drivers	Competency Name	Functional Expertise	Competency Desc
4	8/19/2003	Evaluation of Performance Drivers	Competency Name	Functional Expertise	Competency Desc

*Data may not always be aligned as shown in the screenshot above; alignment varies with form content

Detailed Document Search ⇒ Export Options ⇒ Export Doc Contents (Compact)

- Use to export the actual data entered into documents
- All checkboxes can be used for this report button option
- Most common detailed document search, ideal for pivot tables

Document Fields: ☐ Select All

☒ Form Template Name ☒ Document Id ☒ Content Id ☒ Status ☒ Overall Rating ☐ Rating Desc ☐ Calculated Overall Rating ☒ Scale

☒ Review Start ☒ Review End ☒ Due On ☐ Created On ☐ Last Modified On ☐ Last Routed On ☒ Completed On

Employee Fields: ☐ Select All

☐ Employee Full Name With Username ☒ Employee Full Name ☒ Employee User Id ☒ Employee Username ☒ Employee First Name ☒ Employee Last Name ☒ Department ☒ Division

Employee Misc Info Fields: ☐ Select All

☒ Job Code ☐ Hire Date ☒ Customizable Field 1 ☒ Customizable Field 2 ☒ Customizable Field 3 ☒ Project ID ☒ Customizable Field 5 ☒ Customizable Field 8 ☒ Customizable Field 9 ☒ Customizable Field 10 ☒ Customizable Field 11 ☒ Customizable Field 12 ☒ Customizable Field 13 ☒ Customizable Field 14 ☒ Customizable Field 15

Manager Info Fields: ☐ Select All

☐ Manager Full Name With Username ☒ Manager Full Name

Document Content Fields: ☐ Select All

☒ Competency ☐ Behavior ☐ Section Name ☐ Section and Weight ☐ Parent Id

☒ PF Id ☒ PF Type ☒ Rater Category ☐ Manager Rating ☐ Employee Rating ☐ Manager Comment ☐ Employee Comment

Goal Info Fields: ☐ Select All

☒ Goal Metric ☒ Goal Target ☒ Goal Task ☒ Goal Id ☒ Goal Status ☐ % Completed/Actual

☒ Type ☒ Name ☒ Start ☒ Due ☒ Target

Misc Info Fields: ☐ Select All

☒ Owner Full Name With Username ☐ Owner Full Name ☐ Owner Id ☐ Owner Username ☐ Owner First Name ☐ Owner Last Name

☐ Originator Full Name With Username ☐ Originator Full Name ☐ Originator Id ☐ Originator Username ☐ Originator First Name ☐ Originator Last Name

☐ Current Step Number ☐ Current Step Name ☐ Total Routing Steps

☐ Include In Progress 360s in Document Content Export

Sample View: Compact Report

- File will contain multiple rows per document

Use document id and content id to link document data split over multiple rows

Microsoft Excel - DocDetails20030904_731.v4e								
File Edit View Insert Format Tools Data Window Help								
A1 Document Id								
Document	Content Id	Status	Process Owner/Currently With	Form Template Name	Employee User Id	Employee Username	Employee First Name	
1	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
2	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
3	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
4	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
5	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
6	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
7	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
8	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
9	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
10	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
11	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
12	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian
13	170	437	Modify Stage	David Drew (dddd)	Management Performance Review	iii	iii	Ian

DocDetails20030904_731							
AK	AL	AM	AN	AO			
Completed On	PF Type	PF Id	PF Name	PF Desc			
1	Overall Rating						
2	Section and Comment(s)	10	Overall Performance Summary and Additional Comments				
3	Section and Comment(s)	7	Evaluation of Performance Drivers				
4	Competency	52	Functional Expertise	 Demonstrates a commitment to meeting/exceeding customer expectations			
5	Competency	53	Business Acumen	 Develops, implements and monitors policies and procedures that improve business performance			
6	Competency	58	Communication	 Communicates information effectively to all stakeholders			
7	Competency	55	Organizational Culture and Values	 Conducts positive negotiations, handles conflict effectively			
8	Competency	56	Leadership	 Creates and communicates a long-term vision and strategy			
9	Competency	57	Results Orientation	 Effectively organizes work and achieves quality results			
10	Section and Comment(s)	6	Individual Performance Goals				
11	Section and Comment(s)	74	Another New Goal	New goal for who?			
12	Goal	3	Corporate Goals - Enterprise				
13	Section and Comment(s)						

Detailed Document Search ⇒ Export Options ⇒ Export Doc Goals

- Extracts document goals only (not goals that exist on plan only)
- Limited set of goal fields
- Used primarily for Basic Objective Management

Document Fields: ☐ Select All
☒ Form Template Name
☒ Review Start
☒ Document Id
☒ Review End
☒ Content Id
☒ Due On
☒ Status
☒ Created On
☒ Overall Rating
☒ Last Modified On
☐ Rating Desc
☐ Last Routed On
☒ Calculated Overall Rating
☒ Scale
☒ Completed On

Employee Fields: ☐ Select All
☒ Employee Full Name With Username
☒ Employee Full Name
☒ Employee User Id
☒ Employee Username
☒ Employee First Name
☒ Employee Last Name
☒ Department
☒ Division

Employee Misc Info Fields: ☐ Select All
☒ Job Code
☐ Hire Date
☐ Customizable Field 1
☒ Customizable Field 2
☒ Customizable Field 3
☒ Project ID
☒ Customizable Field 5
☒ Customizable Field 8
☒ Customizable Field 9
☒ Customizable Field 10
☒ Customizable Field 11
☒ Customizable Field 12
☒ Customizable Field 13
☒ Customizable Field 14
☒ Customizable Field 15

Manager Info Fields: ☐ Select All
☒ Manager Full Name With Username
☒ Manager Full Name
☒ Manager Id
☒ Manager Username
☒ Manager First Name
☒ Manager Last Name

Document Content Fields: ☐ Select All
☒ Competency
☒ Behavior
☒ Goal
☒ Successor
☒ Custom Field(s)
☒ Comment(s)
☒ Section Name
☒ Section and
☒ PF Id
☒ PF Type
☒ PF Name
☒ PF Desc
☒ Rating
☒ Rating Desc
☒ Weight
☒ Parent Id
☒ Grouping
☒ Manager Category
☒ Manager Rating
☒ Manager Comment
☒ Employee Comment

Goal Info Fields: ☐ Select All
☒ Goal Metric
☒ Goal Target
☒ Goal Task
☒ Goal Id
☒ Goal Status
☒ % Completed/Actual
☒ Type
☒ Name
☒ Start
☒ Due
☒ Target

Misc Info Fields: ☐ Select All
☒ Owner Full Name With Username
☒ Owner Full Name
☒ Owner Id
☒ Owner Username
☒ Owner First Name
☒ Owner Last Name
☒ Originator Full Name With Username
☒ Originator Full Name
☒ Originator Id
☒ Originator Username
☒ Originator First Name
☒ Originator Last Name
☒ Current Step Number
☒ Current Step Name
☒ Total Routing Steps

☐ Include In Progress 360s in Document Content Export

Generate Report Export Report **Export Doc Goals** Export Search Criteria Cancel

You may be wondering...

What if I need a *custom* report?

Challenge

You've defined your business strategy and one thing is clear – you need to communicate relevant metrics to your organization in a unique reporting format.

- *How can I extract additional insights from SuccessFactors in a new format that isn't currently available as a standard report?*
- *How can I combine several separate reports into a condensed, clear report when I don't have the technical resources within my organization to create custom reports?*
- *Since we are used to viewing our performance and talent data in a specific format, how can SuccessFactors help me re-create this similar report that I can leverage for executive discussions?*

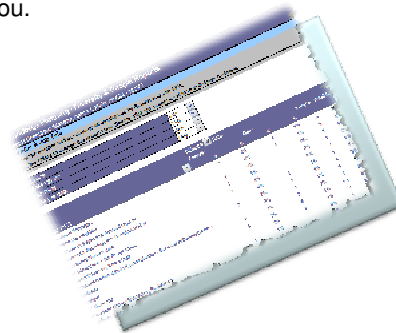
Your Solution...

SuccessFactors Premium Reporting & Analytics

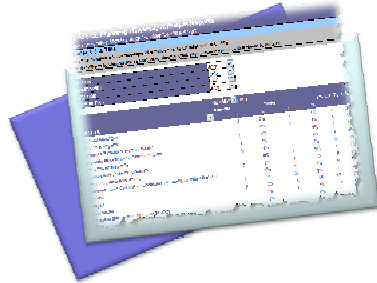
“What gets measured, matters!”

We believe this saying is absolutely on target and reflects an understanding of the importance of reporting quantitative measures about Human Capital Performance. Getting such measures into a format meets your specific requirements is important and SuccessFactors is eager to support you.

How it Works...



Custom Reporting & Analytics



Flexibility:

- Familiar data format
- Flexible deployment options
- Partnership with an HCM expert
- Specified to YOUR requirements!

Value:

- Drive accountability across the organization (Executives, HR, Managers)
- Quicker acceptance and adoption
- Additional insights from SuccessFactors usage
- Successful transition enabling long-term success
- Increasing dialogue with Senior Executives

“Measuring what Matters Most to YOUR Organization”

 SuccessFactors
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Premium Reporting & Analytics

For Additional Information

- Email BTS@successfactors.com
- Call your Sales Manager
- Call Jessica Kane in Business Transformation Services at 704.660.5320 or email at jkane@successfactors.com

“Measuring what Matters Most to YOUR Organization”

 SuccessFactors
People Performance

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Summary

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Summary

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- Dashboard
- 3 Types of Dashboards
 - Summary
 - Performance
 - Objective Management
- List Views are the details behind the charts
 - Include configurable display options, can be saved for quick reference and are easily exported
- Reports
- 4 Types of Reports
 - List Views
 - Classic Reports
 - Spreadsheet Reports
 - Spotlight Views
- Detailed Doc Search

OneVoice

SUCCESS



Welcome,

OneVoice is SuccessFactors' brand new Customer Advisory Board program. It was created to make sure all customers can have a voice in product direction and get all the information you need to make smart decisions about how best to use SuccessFactors products within your company. Each SuccessFactors product module has its own OneVoice group, each of which is moderated by one of our product managers. Monthly virtual meetings for each group cover what to expect in the next 90 days with that product, as well as providing a forum for discussing ongoing issues, concerns, and the overall product vision. Join one group. Join five. We want to hear from you. And we want to make sure you know what to expect from the products you've come to rely on - now and into the future.

Upcoming Meetings:

[Performance Management](#)
[Compensation Management](#)
[Employee Profile](#)
[Succession Management](#)
[Learning & Development](#)
[Analytics & Reporting](#)

July 10th, 11am PDT
July 15th, 11am PDT
July 17th, 8am PDT
July 22nd, 8am PDT
July 24th, 11am PDT
July 29th, 8am PDT

<http://community.successfactors.com/onevoice>

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Questions?

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Thank you!



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